

INSIDE
HIGHER ED



Responding to the COVID-19 Crisis, Part II: A New Survey of College and University Presidents

A study by *Inside Higher Ed* and Hanover Research

April 2020



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As institutions, educators, students, and staff face great change and disruption during the coronavirus outbreak, we are dedicated to serving you in these difficult times. Over the coming weeks and months, we'll help you navigate the unknown with learning opportunities, best practices, and helpful resources.

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INTRODUCTION AND METHODOLOGY

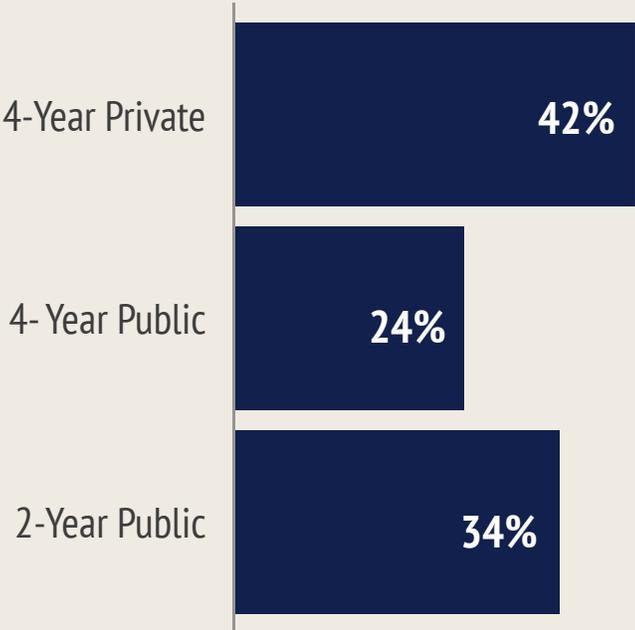
Inside Higher Ed partnered with Hanover Research to develop and disseminate a COVID-19 Perceptions and Response Survey to college and university presidents.

The survey was administered online in April 2020. The analysis includes a total of 187 respondents. Respondents were President or Chancellor, currently employed at a 4-year Private, 4-year Public, or 2-year Public institution. Statistically significant differences (95% confidence level) between groups are noted with an asterisk (*).

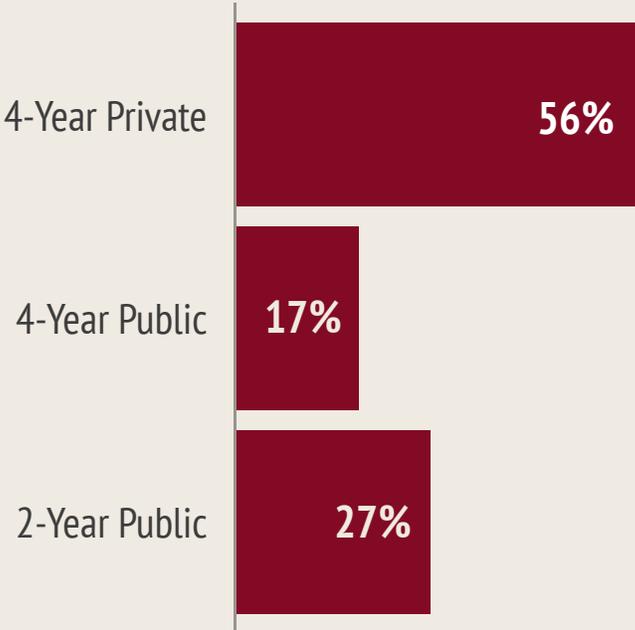
A similar survey was conducted in March 2020 and both data are provided where applicable.

RESPONDENT PROFILE

Which of the following best describes your institution? April (n=187)



Which of the following best describes your institution? March (n=172)



IMMEDIATE-TERM ISSUES

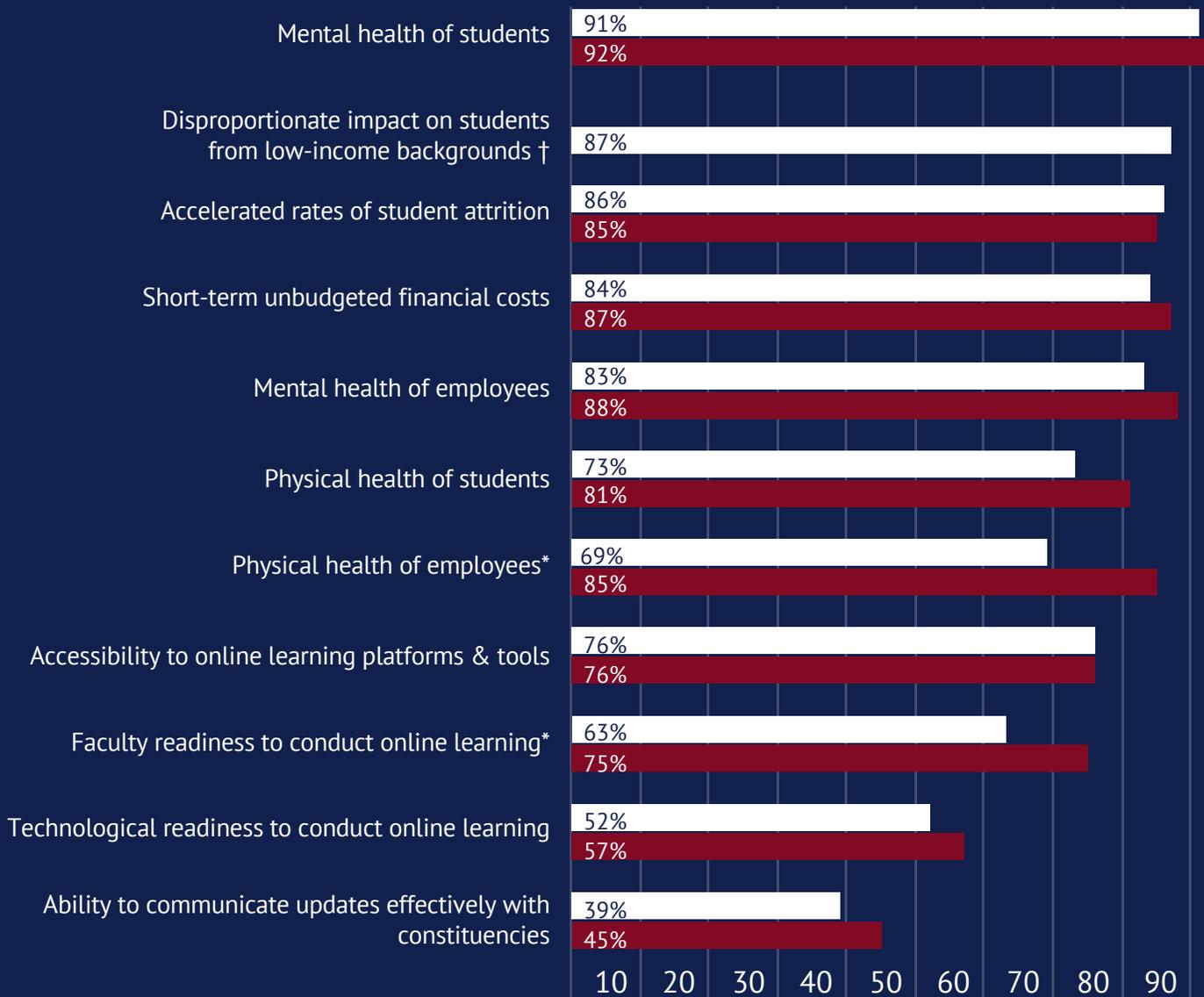
Respondents continue to worry about the mental and physical health of students and employees in the immediate term. As shown in the figure below, at least two-thirds of respondents in the April survey are somewhat or very concerned about the mental and physical health of students and employees. However, these levels have declined slightly since March, particularly regarding the physical health of students (81% to 73%) and employees (85% to 69%).

How would you rate your current level of concern related to the following immediate-term issues in regard to COVID-19? (n=164)

% Very Concerned + % Somewhat Concerned

April (n=183)

March (n=164)



* Indicates a statistically significant difference between survey iterations.



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SHORT-TERM ISSUES

Short-term student attrition and long-term enrollment drops continue to present obstacles to maintaining stability. Nearly all respondents once again report that they are somewhat or very concerned about the immediate-term accelerated rates of student attrition (86%; up slightly from 85% in March) and long-term decline in future student enrollment (90%; up slightly from 88% in March).

How would you rate your level of concern with the following potential [immediate-term/long-term issues] at your institution in regard to COVID-19?

Top 5 Options: % Very Concerned + % Somewhat Concerned

	Immediate-Term (n=183)	Long-Term (n=179)
1	Mental health of students (91%)	Decline in overall future student enrollment (90%)
2	Disproportionate impact on students from low-income backgrounds (87%)	Inequitable impact on underrepresented students (90%)
3	Accelerated rates of student attrition (84%)	Overall financial stability (88%)
4	Short-term unbudgeted financial costs (86%)	Ability to afford to employ staff and faculty (81%)
5	Mental health of employees (87%)	Decline in alumni/donor giving rates (56%)

Respondents also report a strong degree of concern for the impact of the virus on low-income and underrepresented students. Ninety percent of respondents are somewhat or very concerned in the long-term about the virus's inequitable impact on underrepresented students. Similarly, in the immediate term, 87% of respondents are somewhat or very concerned about the virus's disproportionate impact on students from low-income backgrounds. Importantly, a majority of respondents report that their institution is somewhat or very likely to increase financial aid (72%) and allow for deferred tuition payments (56%) in the future.

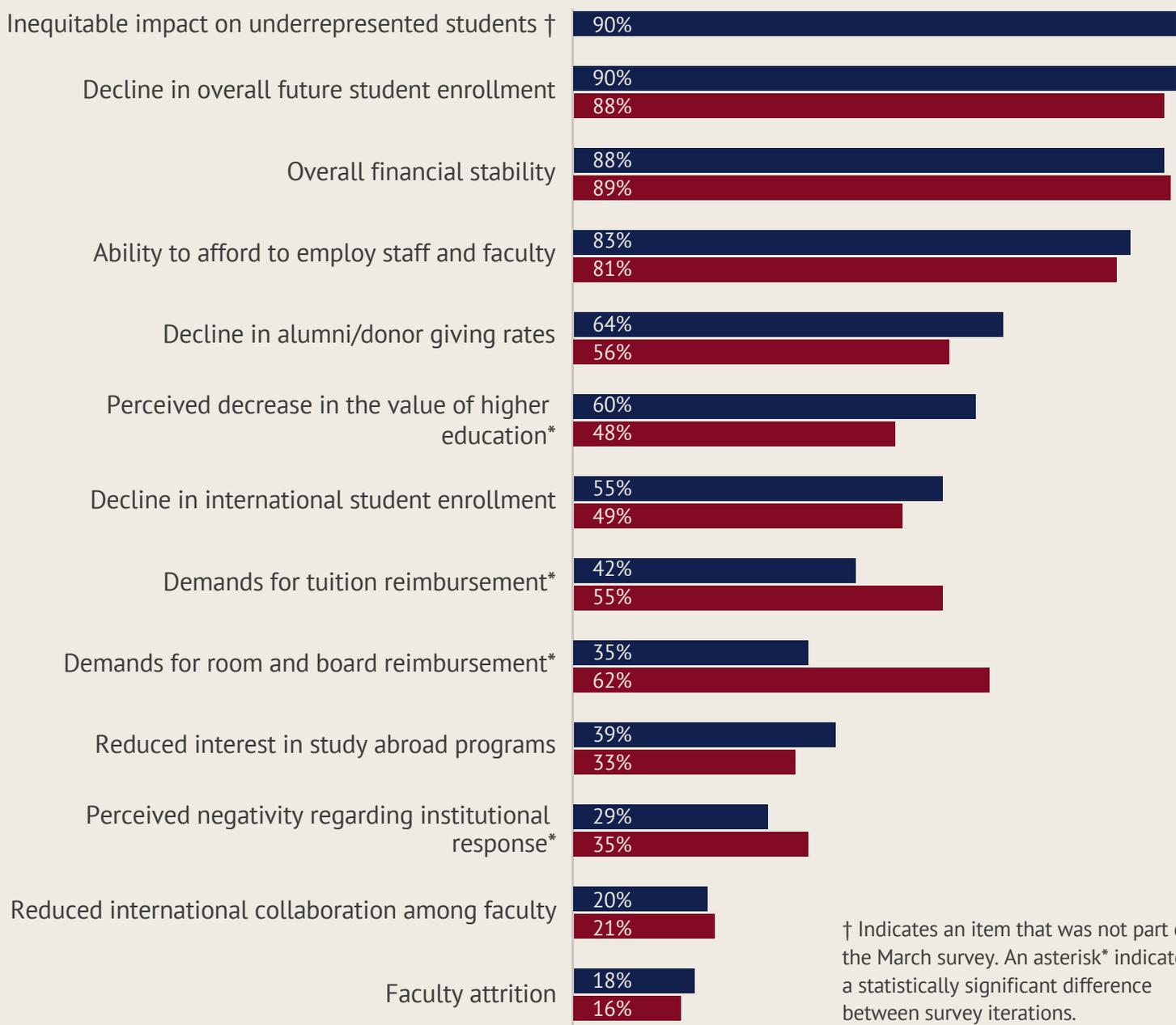
LONG-TERM ISSUES

Presidents express deep concern about COVID-19’s inequitable impact underrepresented and low-income students, as well as about their institutions’ future enrollment and overall financial stability. They were less concerned in April than in March about student demands for reimbursement of tuition and room and board.

How would you rate your level of concern with the following potential long-term issues at your institution in regard to COVID-19?

% Very Concerned + % Somewhat Concerned

April (n=179) March (n=160)



† Indicates an item that was not part of the March survey. An asterisk* indicates a statistically significant difference between survey iterations.

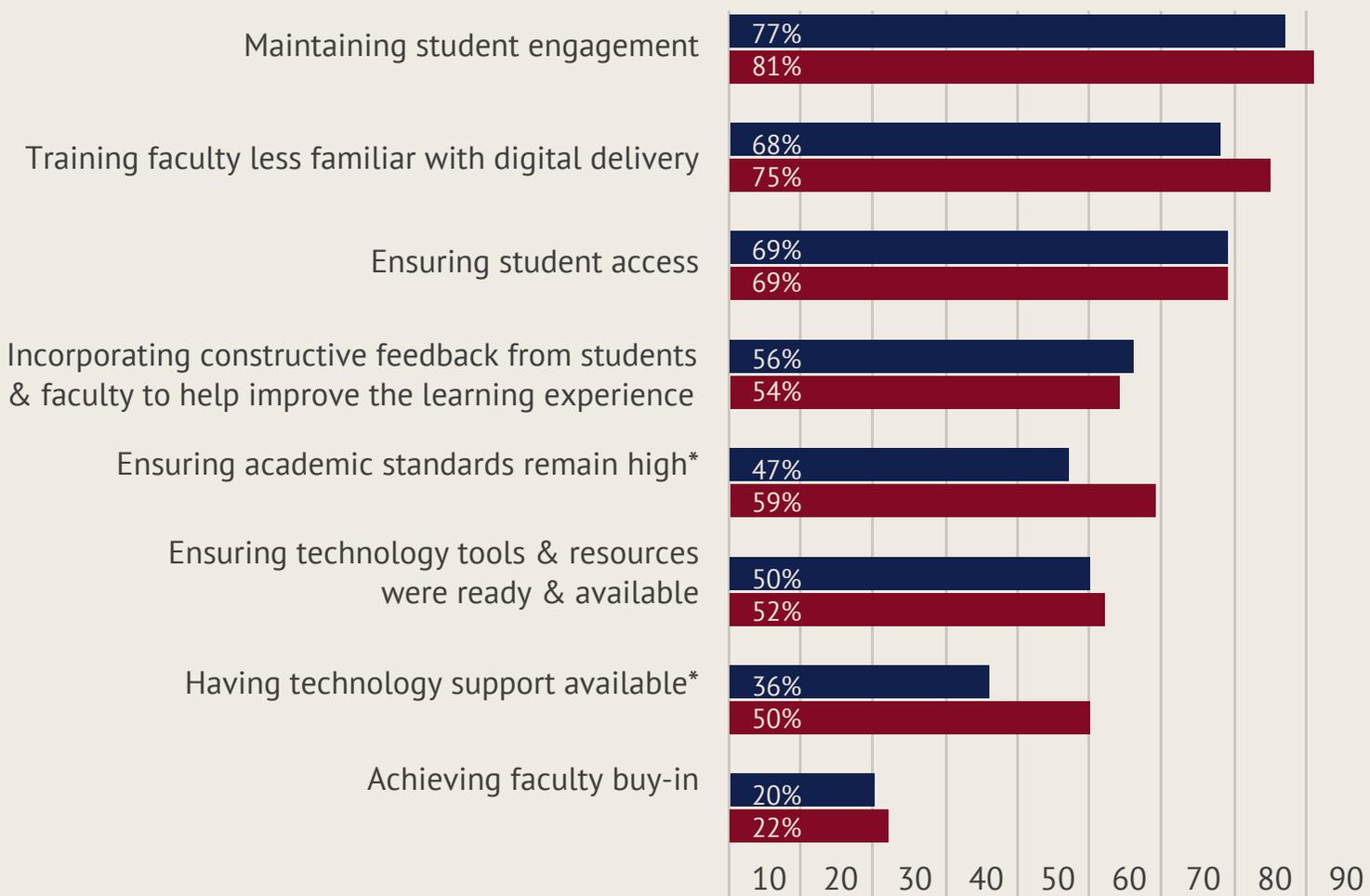
REMOTE LEARNING CHALLENGES

Fewer presidents in April than in March rated the shift to digital instruction as very or somewhat challenging in terms of training faculty members less familiar with digital delivery (69% vs. 75%), ensuring that academic standards remained high (47% versus 59%), and having technology support available (36% versus 50%).

How would you rate the level of challenge at your institution associated with moving in-person classes to a remote or online setting for the following activities?

% Very Challenging + % Somewhat Challenging

April (n=169-176) March (n=144-158)



An asterisk* indicates a statistically significant difference between survey iterations.

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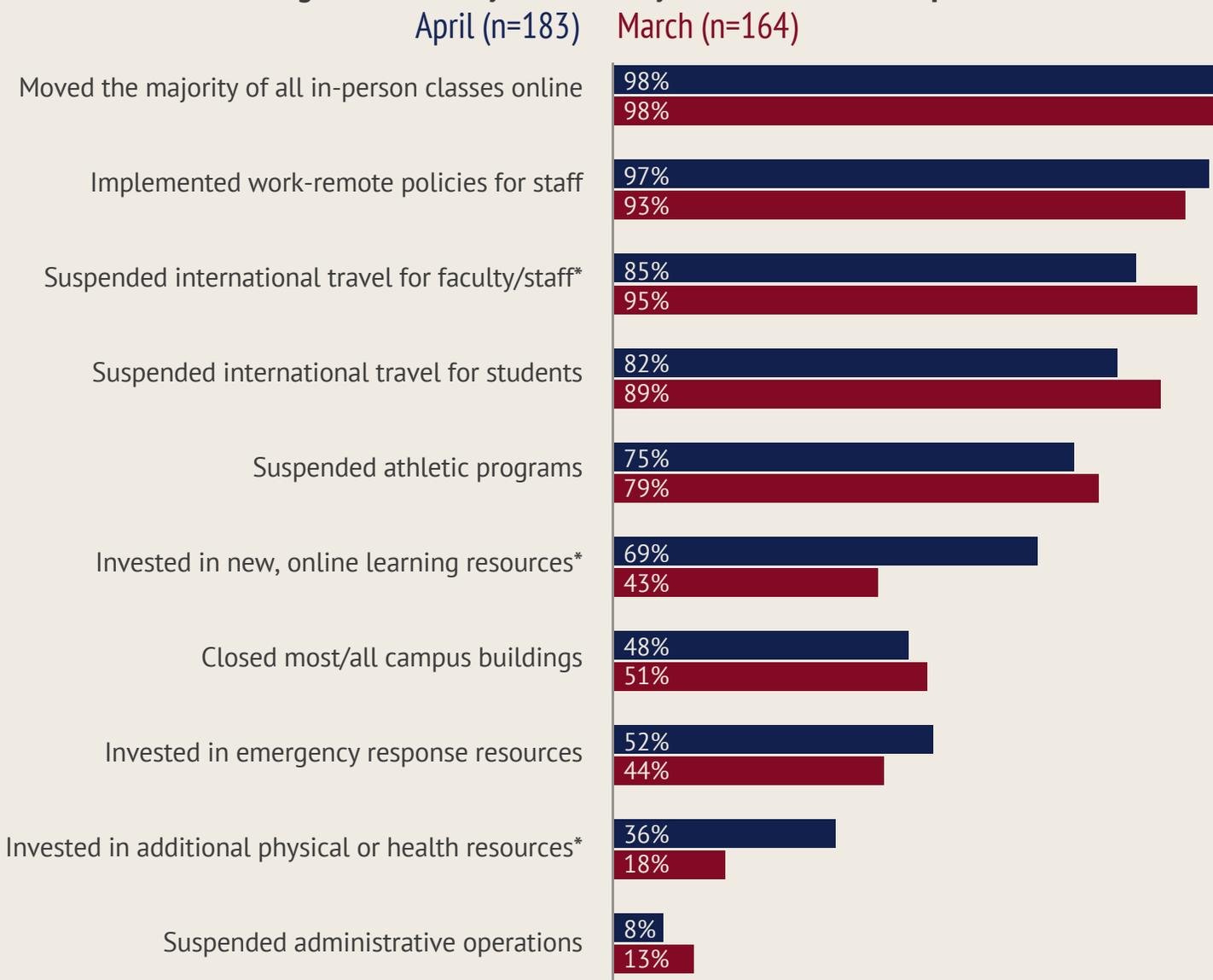
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INSTITUTIONAL RESPONSE

Respondents report that their institutions are increasing investment in mental and physical health resources. Since March, the percentage of respondents whose institution has invested in additional physical or mental health resources has doubled, as shown in the graph below.

Investment in online learning resources has also become a top priority. Just over two-thirds of respondents report investing in new, online learning resources (69%) as a result of the virus, up from 43% in March.

Which of the following actions have you taken at your institution in response to COVID-19?



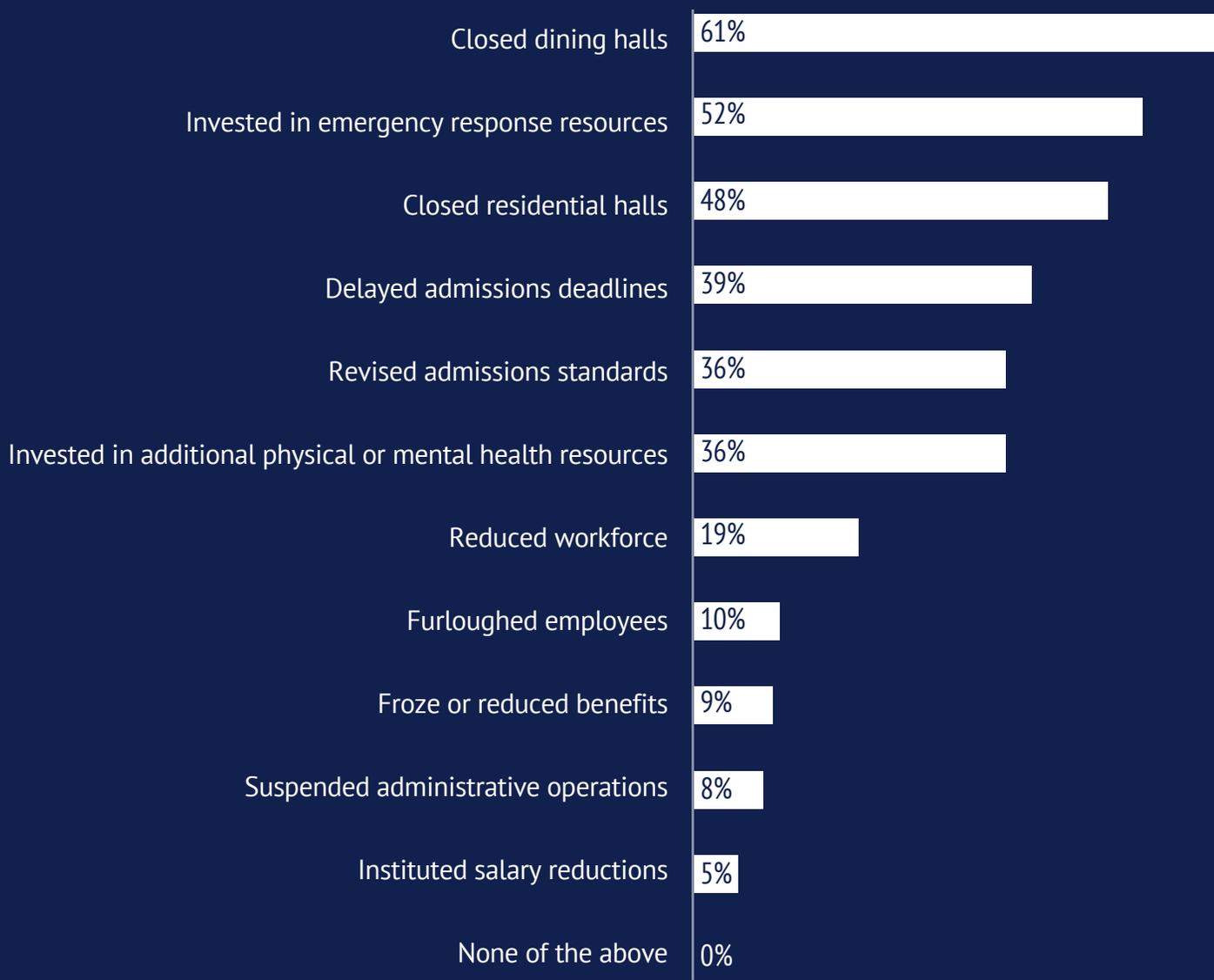
Note: Several answer options were added to this question for the April iteration. This table displays the results where longitudinal comparisons could be made. An asterisk* indicates a statistically significant difference between survey iterations.

CURRENT INSTITUTIONAL RESPONSE

Fewer than one in five presidents said their institutions had by mid-April taken actions that affected employees' jobs or pay, with 19% having reduced their workforces and 10% or fewer furloughing employees, freezing or reducing benefits, or cutting pay.

Which of the following actions have you already taken at your institution in response to COVID-19?

April (n=183)



FUTURE INSTITUTIONAL RESPONSE

More than three-quarters of respondents whose institutions have not yet invested in online learning resources indicate that they are likely to do so in the future (76%), compared to just under half in March (47%).

Significant proportions of presidents who said their campuses had not yet reduced their workforces or furloughed employees said they were likely to do so in the future.

How likely is your institution to take the following actions in the future? % Very Likely + % Somewhat Likely (April)



Note: Several answer options were added to this question for the April iteration. Respondents only saw actions they had not taken.

AN OPEN LETTER OF GRATITUDE

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And we, in turn, prepare the world for them.*

Why we do what we do? Is it the glamor? The prestige? The high pay?

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We prepare them for the world. And we, in turn, help prepare the world for them. Because we know it matters.

We want to thank you for being a part of this community and work. We want to thank you for being selfless, tireless and driven. Because without you, this work wouldn't happen. And the world would lose something important about itself.

Look around at the people that are working so tirelessly to keep schools running, keeping the promise of education alive in this era of change.

When you look at them, you'll look into the faces of people who don't think of themselves as heroes, and yet, they are.

Thank you for always showing us that, no matter what challenges we face, we are always better together.

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REVERSING INSTITUTIONAL RESPONSE

Nearly half of presidents believe their institutions will reopen to students by the fall term, with in-person instruction and sports programs resuming and dining halls opening.

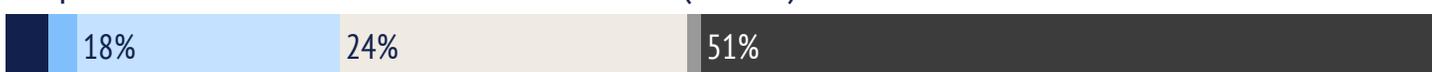
When do you expect to reverse these actions by?



Froze or reduced benefits (n=17)



Suspended international travel for students (n=148)



Revised admissions standards (n=65)



Suspended international travel for faculty/staff (n=153)



Reduced workforce (n=34)



Invested in emergency response resources (n=94)



Suspended athletic programs (n=135)



Closed residential halls (n=85)



Note: Respondents only saw actions that they indicated they had already taken.

REVERSING INSTITUTIONAL RESPONSE (cont.)

When do you expect to reverse these actions by?



Invested in additional physical or mental health resources (n=65)



Moved the majority of all in-person classes online (n=176)



Implemented work-remote policies for staff (n=174)



Closed administrative offices (n=126)



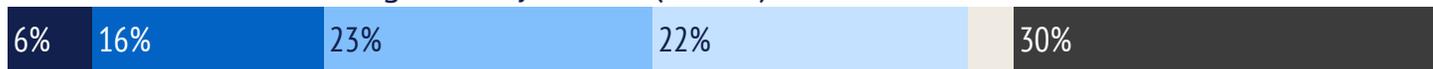
Delayed admissions deadlines (n=71)



Moved campus tours online (n=148)



Closed academic buildings/faculty offices (n=154)



Moved admissions online (n=145)



Note: Respondents only saw actions that they indicated they had already taken.



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REVERSING INSTITUTIONAL RESPONSE (cont.)

When do you expect to reverse these actions by?



Invested in new, online learning resources (n=127)



Closed dining halls (n=109)



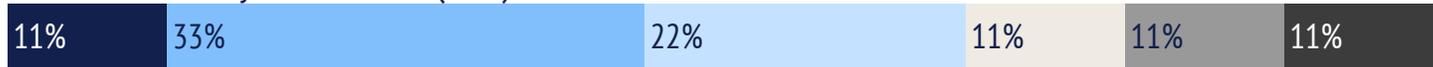
Suspended administrative operations (n=14)



Furloughed employees (n=19)



Instituted salary reductions (n=9)

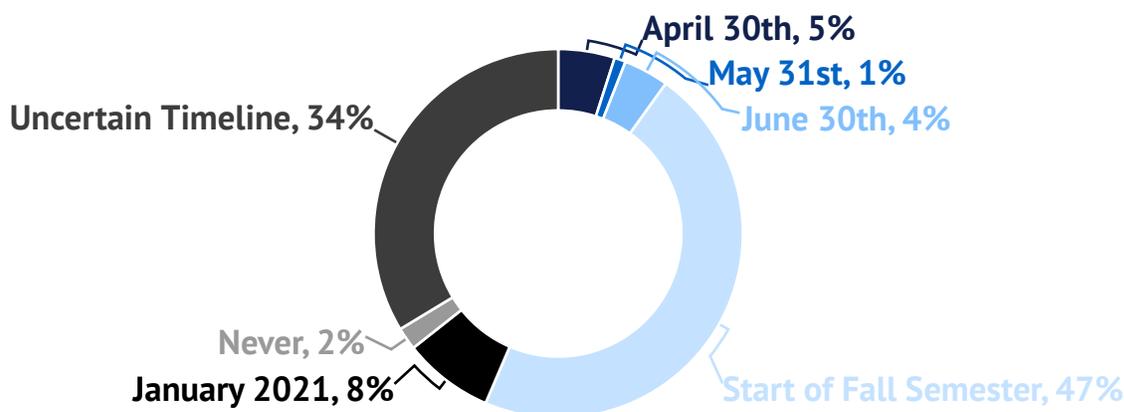


Note: Respondents only saw actions that they indicated they had already taken.

RESUMPTION OF IN-PERSON CLASSES

Respondents most commonly expect to reverse the move to online classes by the fall semester, as shown in the graph below. Although, many are still uncertain (34%).

When do you expect to reverse these actions by?
(Moved the majority of all in-person classes online, n=176)



FUTURE REVENUE AND COST ACTIONS

Campus leaders are more focused on actions that would increase revenue – cultivating new donors and seeking more state support -- than on reducing academic programs or cutting other offerings.

How likely is your institution to take the following actions in the future to increase revenue or cut costs?

% Very Likely + % Somewhat Likely

April (n=153-174)



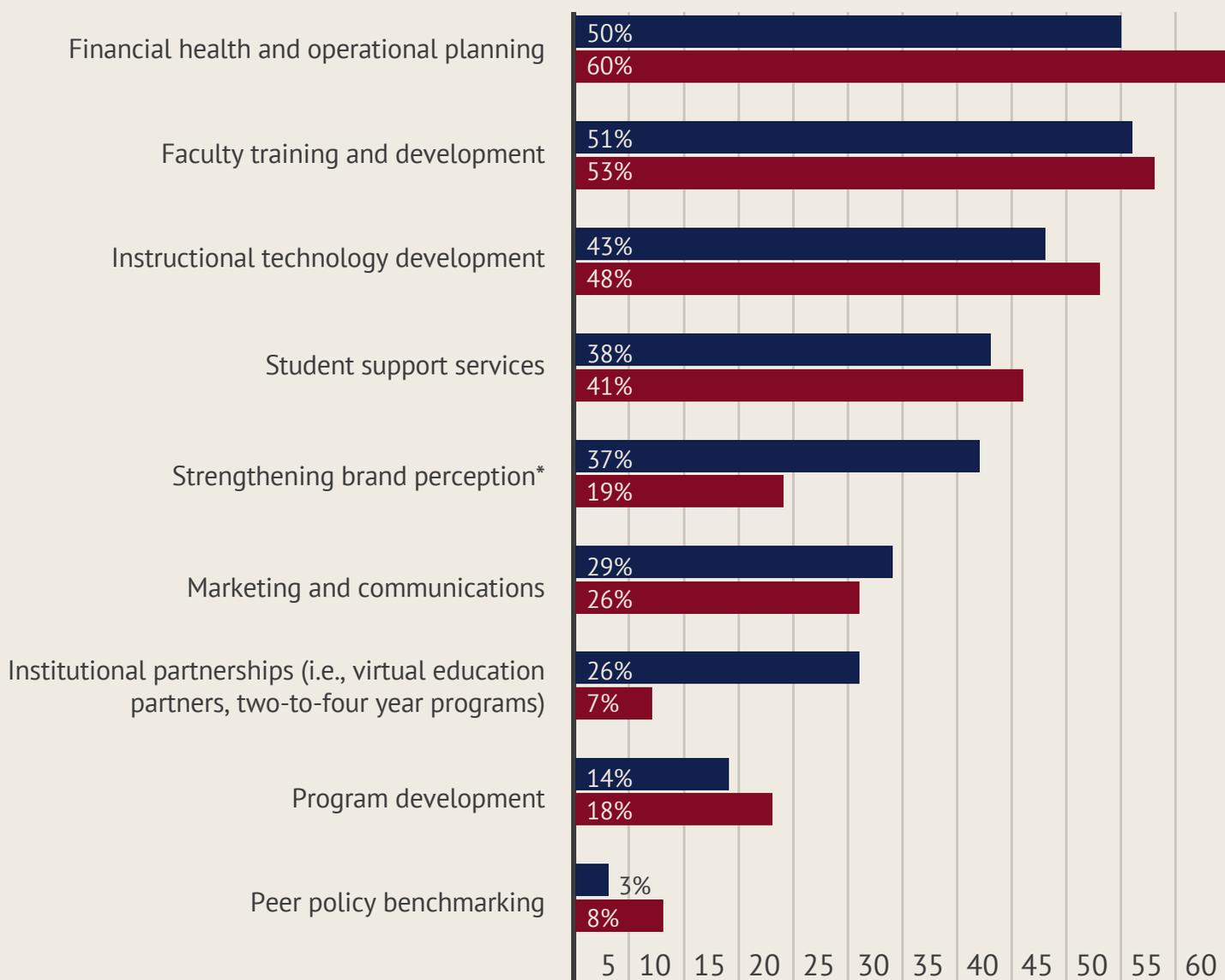
OPERATIONAL SUPPORT

Campus leaders list financial health and operational planning” as the top area in which their institution could benefit from outside operational support. But they cite two areas much more in April than they did in May: strengthening the perception of their institution’s brand and institutional partnerships.

Of the following areas, where do you feel your institution needs the most additional operational support to successfully navigate beyond the COVID-19 crisis?

Select up to your top 3 options.

April (n=173) March (n=159)



An asterisk* indicates a statistically significant difference between survey iterations.

STATE AND FEDERAL GOVERNMENT SUPPORT

Presidents rated stimulus funds to compensate their institutions for financial losses as their greatest need from federal or state governments, followed by flexibility on regulatory limitations regarding remote learning and a mental health resource allocation for students.

Of the following areas, where does your institution need the most additional support from state and federal governments to successfully navigate beyond the COVID-19 crisis? Select up to 3. April (n=174)



93%

Financial stimulus package to compensate for losses. Up from 89%, March 2020.



58%

Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.).* Down from 71%, March 2020.



41%

Mental health resource allocation for students. Up from 33%, March 2020.



19%

Easing of borrowing provisions to help colleges bridge short-term financial difficulties. Down from 37%, March 2020.



27%

Delay on new regulatory commissions†



20%

Ability to leverage endowment funds without negatively impacting financial responsibility score. Down from 25%, March 2020.



13%

Assistance with processing student visas more efficiently. Down from 14%, March 2020.

† Indicates an item that was not part of the March survey.
An asterisk* indicates a statistically significant difference between survey iterations.

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